# SSIS Mentor Meeting Minutes

## May 16, 2006

| Topic | Discussion | Action Item |
|---|---|---|
| **Mentoring 101**<br>**Early bird session**<br>**8:00am-8:30am** | Maureen presented a short refresher on IV-E process for social workers. Handout of *Workflow Process* is on the web. | |
| **Welcome** | • Maureen welcomed all mentors.  Counties introduced their new mentors and SSIS staff were identified.<br><br>• The minutes of the 2/28/06 Worker mentor meeting are posted on the Mentor Meeting Minutes page of the Worker Mentor Program web site.<br><br>• MPAC meetings:<br><br>  1. Region 2 was in need of an MPAC representative and Angi Freund, Hubbard County volunteered.  Thanks, Angi.<br><br>  2. Partnership Committee, which includes SSIS Management and County directors, approved the proposal regarding the Worker Mentor Program holding two of the last four mentor meetings in VPC format. They will also review the evaluations at the end of the year to determine if this should be continued in 2007.<br><br>  3. **The next Worker mentor meeting, scheduled for July 11, 2006 at the Holiday Inn, has been cancelled. The first VPC is July 24, 2006.** | **July Worker Mentor meeting scheduled.** |
| **SSIS update** | Beth Dewyre's update included:<br>▪ There is a NWT training schedule for the summer.<br>▪ Bug in Business Organization regarding Services Offered<br>  o If the Business Organization Service is set to Required in SSIS Administration in County Preferences and a vendor is not selected in Service Arrangements and the Program and Services are selected, the required sub-service does not drop down. When the Bus Org is not set to required, the sub-service field is enabled in Service Arrangements after Program and Services are filled in.<br>▪ New training requirement for all trainings (NWT & New Version)—**All trainees who do not have regular use of SSIS and are attending training must complete the** SSIS Overview CBT **that is on the Training web page.**<br>▪ There are Metro labs for Version 4.1 training that are available. Beth Dewyre will send out an email when labs having vacancies are available to any county, no matter how many trainees are signed up.  This will be first come, first served basis. | **Memo sent by Maureen Zinda on 5/25.06** |

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| **Payments** | Beth Sahr walked the mentors through Searching for a Payment and Adding an Amendment to a Service Arrangement for Social Services staff. Highlights were:<br>• Search screen is the same format as all SSIS search screens.<br>• Staff are able to search by Vendor, Chart of Account, Service, Client name, etc.<br>• The results grid will show all payment types for the social service staff. | Handout on the web. |
| **Adoption** | Lisa Litchfield showed the mentors the new Adoption screens for use in 4.1. Highlights included:<br><br>• New tab name under Guardianship/TPR and Barriers to Adoption has changed from Special Needs.<br><br>• All sibling relationships display on the Sibling Information.<br><br>• Adoption Legally at Risk has a new drop-down list.<br><br>• New Adoption AFCARS Entry screen<br><br>• New Data Clean-up message. | Handout on the web |
| **Interface of MA Eligibility Reports through MMIS** | Beth Dewyre presented information regarding how MMIS information will come into SSIS with Version 4.1.Highlights were:<br>• The information will interface from MMIS nightly for display in the morning.<br>• This information is view only for the social services staff. | Handout on the web |
| **Vendor Import and Provider Entry Refresher** | Beth Dewyre presented additional information regarding entering vendors because it was not included in the import training. | |
| **Breakout Sessions regarding Version 4.0** | Trainers set up six stations featuring specific V4.0 areas of interest. Mentors were asked to spend 15 minutes at each station during the one and a half hours allotted. Trainers were on hand to answer questions.<br><br>There was a summary discussion about the value of this process for the present meeting and future meetings. Overall, the process was accepted as valuable with some changes to location in the room, noise level and length of time of sessions. MPAC members also agreed that it seemed to be a valuable resource of getting many more questions answered in a short amount of time. Biggest concern was making sure that all mentors heard answers to all questions and how to make that happen.<br><br>The trainers created a highlight document from the questions; it is attached to this document. | |
| **Next meeting** | **July 24, 2006—1:30 p.m.-4:30 p.m. in VPC format.**<br><br>**The July 11, 2006 at the Holiday Inn has been cancelled**<br><br>**Agenda will be out 6/23/06.** | |

## *Highlights for the SSIS Worker Mentor Meeting*
## *Breakout Sessions*

## Supplemental Health Care

- Must have security admin rights of "Enter Supplemental Eligibility"

- Supplemental Health Care Eligibility Reports are available in General Reports under Eligibility. They are available now, in 4.0 – I misspoke and stated they would be in 4.1

- When you complete a workgroup change, from the WG change log, the application updates the workgroup on the Supplemental Health Care screens. Therefore, updating the manner in which the record will be included in the general reports.

- Once the initial eligibility information is entered, the screen does not need to be updated until the client becomes ineligible (for CW-TCM, that means the client no longer meets one of the three risk/need categories) at which point an end date needs to be entered.

- Rule 5 screening date: Most counties have a placement review team that determines the needs of the child in reference to the level of care for a particular placement. This placement meeting can be used for the Rule 5 screening date.

- Between now and the end of the year, entry of Supplemental Health Care Eligibility will need to be done in CSIS and SSIS. This is due to preparing for the claiming process. Claiming will temporarily continue in CSIS, however data needs to be in SSIS to test and begin the claiming process, for each county, through SSIS.

- You have from now until Dec to enter all supplemental health care information. Pace yourself so you will be prepared.
     Suggested: Enter the initial eligibility on the first tab. Enter the most recent review on the second tab. Do not enter all of the reviews in between.

- Contracted CMH, if CMH children are being placed, information needs to be entered into SSIS either by the contracted agency or the county. Preferably by contracted agency so as to minimize duplicate entry (ie. eliminating contracted providers writing it down, handing it to county staff for entry).

- CMH-TCM and CW-TCM (dual case management): Complete a TCM eligibility for each type of Supplemental Health Care.
- When a CP case is closing, but a CMH is remaining open, update the CW-TCM eligibility screen with the CMH workgroup. The eligibility is client specific,

follows the client not the workgroup, therefore the workgroup is all that needs to be updated.

## Vouchers and Service Agreements

- There's no vendor or bus/org number on the voucher; this would be helpful for when the county receives a voucher as an invoice and wanting to look up the provider by that number.

- Can you print multiple vouchers in one action? Yes, you can print vouchers for all Service Arrangements approved for payment to one vendor or all vendors within a date range by and filtered by service, COA, client, county contact, by using the Voucher by Vendor report (or Voucher by Client report for client specific printing) in Tools > General Reports.

- Can you print multiple services on one voucher? Yes (see previous question)

- If a payee is selected, direct service provider info does not appear on the voucher. Could be confusing to a payee with numerous providers.

- Want the ability to add comments to a voucher.

## Service Arrangements

- Seems to be a lot of entry on seniors for care, etc.
- Some counties are using many county sub-codes, IV-E sub-codes, and COA's.
- Is it really necessary to end the date of Service Arrangement if they don't encumber funds
- What info is required to send for approval? The counties were confused as we have told them that only 5 fields were required to save an arrangement. This is correct, however if the service is foster care, DOC, units and unit type are required.
- Counties were stating that the rate for foster care was incorrect. Not true. Counties were selecting DOC and then changing the rate, to match the rate they used and the total was higher than should be. The problem is that the Counties added DOC points to the per diem in old systems and in SSIS DOC is added to per diem to arrive at total. Counties need to back out DOC points to get their per diem. Not all counties use the standard per diems issued by the State.

## *Highlights for the SSIS Worker Mentor Meeting*
## *Breakout Sessions*

## Chart of Account Group Maximums
- Search for Group Maximum before creating them
- The area of focus creates the Action menu items
- The area of focus is outlined in blue on the detail screen
- Associate COA maximums to the COA Group Maximums
- This function is not mandatory
- This function is valuable for budget monitoring and watching trends in money disbursement
- The county is able to copy group maximums from year to year
- There are Reports that help with errors

## County Preference
Yearly Settings
- Complete information on Yearly settings tab before creating Service Arrangements, COA maximums or Payment requests
- G/L close date is editable in the future.
- Other areas of the screen are not editable
- Encumber Service Arrangements is either yes or no.
- Require COA maximum
  Yes—Must have on all
  No—Counties can choose which COA needs a maximum
- Exceed COA maximums
  Error—Worker cannot save Service Arrangement as it is written
  Warning—Worker will get a warning and county policy directs what staff person has to do next.

Agreement Language Tab
- County can create language or use SSIS defined language as default.
- Worker can override the SSIS default or the county default by selecting an alternate if one exists

Title IV-E Tab:
- History of Maintenance Agreements in effect and history of agreements.
- DHS agreements cannot be edited by a county user.

Special Cost Codes:
- Found in SSIS Administration under Tools
- DHS defines some and counties can add others
- Special Cost Codes include Initial Clothing Allowance

Payment Accrual Codes
- Based on payment's service date
- Can run from first of the year to the G/L close date.

## <u>Service Arrangement Groups</u>

Service Arrangements Groups Highlights from the May 16 Break Out Session

- Service Arrangement Groups are optional
- A particular Service Arrangement can be in only <u>**one**</u> Service Arrangement Group.
- If a Vendor is selected on the Service Arrangement Group entry screen, all Service Arrangements attached to that Group must have the same vendor.
- Using Service Arrangement Groups are one way counties can track expenditures:
  - Even if they do not encumber funds
  - By a minimum guarantee for a particular vendor
  - Broken down in smaller categories than can be done with a COA, e.g.,:
    - by placements in foster homes licensed by the county vs. by placements in foster homes not licensed by the county
    - by services provided to a particular family which may cover family members with different last names and/or different COA codes
    - by a particular unit  when there are multiple units providing ongoing CP services.

- If counties elect to use Service Arrangement Groups it is advised that a protocol is developed. The protocol discussion should include:
  - How/when will the county use Service Arrangement Groups
  - Who will set them up
  - A naming convention so staff can readily find the correct Service Arrangement Group when attaching a Service Arrangement to it.
  - Will social workers creating Service Arrangements attach them to a Service Arrangement Group? If so, communication must be in place so social workers know the particulars of when Service Arrangement Groups will be used. If not, who will attach Service Arrangements to Service Arrangement Groups?.